

Central Investment Proposition - Adding Off Platform Products

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For details on how to Create a Central Investment Proposition, see article [Creating a Central Investment Proposition](#)

We have created our CIP, we can now add off platforms to include in the Central Investment Proposition.

The screenshot shows the 'Central Investment Proposition' interface. At the top, there is a search bar and navigation tabs: Synaptic Pathways, Home, Contacts, Research, Portfolio Builder, Investment Pathways, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, Valuations, and 'Central Investment Propos...'. Below the navigation, there are summary cards for Platforms (8), Off Platform (0), Portfolios (0), and Segments (0). The main content area is divided into two sections: 'Choose Platforms to Include' and 'On Platform Product Selected'. The 'Choose Platforms to Include' section has a search bar with 'a' and a list of platforms with checkboxes: 7IM Platform, abrdn Wrap, Advance by Embark Platform, Aegon Platform, AEGON Retirement Choices, AJ Bell Investcentre, AJ Bell Investcentre (RIA), Ascentic - The Whole of Market Wrap, and Aviva Wrap. The 'On Platform Product Selected' section has a search bar and a table of investment platforms. The table has columns: Product Name, Provider, Product Type, Product Basis, Included, and Reason. The table lists three products under 'AEGON Retirement Choices': 'Aegon Retirement Choices SIPP', 'Aegon Retirement Choices SIPP Income Drawdown', and 'AEGON Stocks & Shares ISA'. Below the table, there are expandable sections for 'AJ Bell Investcentre', 'Aegon Platform', and 'Aviva Wrap'.

Click into the **Off Platforms Products** tab:

This screenshot shows the same interface as the previous one, but with the 'Off Platform Products' tab selected. The 'Choose Platforms to Include' section now only shows '7IM Platform' and 'abrdn Wrap' in the list. The 'On Platform Product Selected' section shows 'Investment Platforms' with a search bar and a dropdown menu for 'AEGON Retirement Choices'. A tooltip 'Off Platform Products' is visible over the 'Off Platform Products' tab.

The search box can be found on the left side of the screen.

The All dropdown allows you to select the product type you would like to search for:



Central Investment Proposition
Central Investment Proposition.

Platforms

8

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Amy Paulsen



Platforms



Off Platform Products



Portfo

Choose Off Platform Products to Include

All



Search by Name

✓ All

Personal Pension (Fully I...

Investment Bond

Offshore Bonds

Individual Savings Acco...


Self Invested Personal P...

Income Drawdown

to include in the Central
position.



Once selected, use the Search box:

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Platforms: **8** | Last Modified: **12 May 2022, 12:02** | Last Modified By: **Amy Paulsen**

Platforms | **Off Platform Products** | Portfolio

Choose Off Platform Products to Include

All

- active money personal pension
Standard Life Assurance Company
- Aegon One Retirement**
AEGON
- Aegon One Retirement (SIPP)
AEGON
- AJ Bell Investcentre SIPP
AJ Bell (Investcentre)
- Flexible Transitions Account
LV=
- Flexible Transitions Account
LV=
- Flexible Transitions Account (LV= Core Funds)
LV=
- Modular iSIPP
James Hay Partnership
- OneSIPP - Standard

The Off Platform Product selected will display within the Products Selected area:

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Platforms: 8 | Last Modified: 12 May 2022, 12:02 | Last Modified By: Amy Paulsen
 Off Platform: 1 | Last Modified: 12 May 2022, 12:05 | Last Modified By: Amy Paulsen
 Portfolios: 0 | Last Modified: | Last Modified By:
 Segments: 0 | Last Modified: | Last Modified By:

Platforms | Off Platform Products | Portfolios | Fund Lists | Segments

Choose Off Platform Products to Include

All | Q: A

- + active money personal pension Standard Life Assurance Company
- Aegon One Retirement AEGON
- + Aegon One Retirement (SIPP) AEGON
- + AJ Bell Investcentre SIPP AJ Bell (Investcentre)
- + Flexible Transitions Account LV=
- + Flexible Transitions Account LV=
- + Flexible Transitions Account (LV= Core Funds) LV=
- + Modular ISIPP James Hay Partnership

Products Selected

Investment Products | Filter by Type | Search by Name

Product Name	Provider Na...	Product Type	Reason	Remove
1 Aegon One Retirement	AEGON	Income Drawdown		

Products can be removed using the bin icon on the right side of the screen:

Products Selected

Investment Products | Filter by Type | Search by Name

Product Name	Provider Na...	Product Type	Reason	Remove
1 Aegon One Retirement	AEGON	Income Drawdown		

For more information on configuring your CIP, see article [Central Investment Proposition - Adding Portfolios](#)